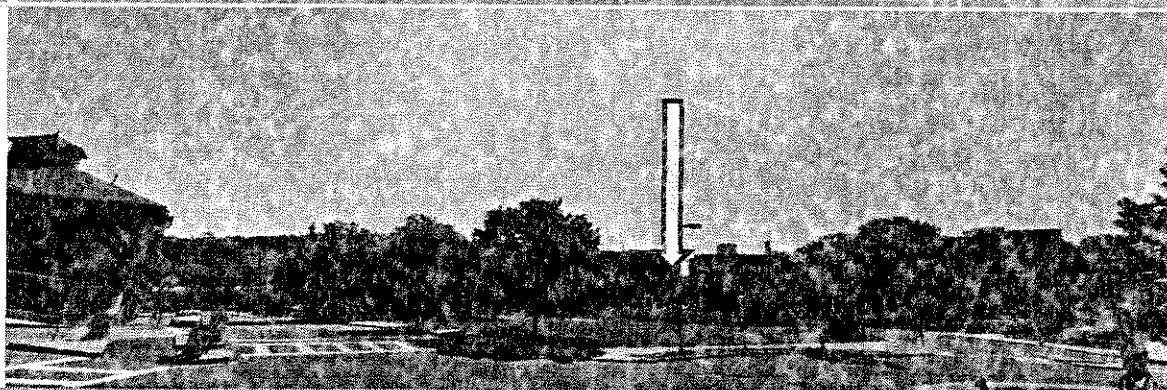


REQUEST FOR PROPOSALS

**Bromley, New Heath and Parker Streets (9-21
Bromley, 894-908 Parker, 58-62 New Heath, 1
Unnumbered Parcel on New Heath)
Affordable Housing/Mixed Use**

CITY OF BOSTON,
DEPARTMENT OF NEIGHBORHOOD DEVELOPMENT



Contact Information:

Department of Neighborhood Development
26 Court Street, 8th Floor
Boston, MA 02108
Attn: David West david.west@boston.gov
(617) 635-0248

How to obtain the Request for Proposals and supporting documents via the DND website:

Go to: <http://www.CityofBoston.gov/DND/RFP>
Click on "Request a Copy."
If you have any problems accessing the system,
please call (617) 635-0248.

Proposal Submittal Deadline:

Proposals will be received until December 22,
2014 at 4:00 p.m. (EST) at:
Department of Neighborhood Development
26 Court Street, 10th Floor (Bid Counter) Boston,
MA 02108

PROPOSAL SUMMARY: Bromley, New Heath and Parker Streets

This is provided for the convenience of prospective bidders to facilitate their navigation of this Request For Proposals. For bidders that have downloaded this from the web, you can get more detailed information by selecting the [More Information](#) links provided here that will take you directly to the appropriate section of this document.

AVAILABLE PROPERTY	10 parcels with combined 28,872 square feet of land More information on page 5						
LOCATION	Mission Hill section of Roxbury More information on page 5						
PREFERRED USES	Affordable rental housing Mixed Use with 1 st story office or job creating businesses and affordable and work force residential units on the upper floors. More information on page 7						
PRICE	<table> <tr> <th>Proposed Use</th><th>Required Price</th></tr> <tr> <td>Affordable/Mixed Income Housing</td><td>\$100 per parcel or \$1,000 total</td></tr> <tr> <td>Mixed Use with Affordable Housing</td><td>\$100 per parcel or \$1,000 total</td></tr> </table> More information on page 11	Proposed Use	Required Price	Affordable/Mixed Income Housing	\$100 per parcel or \$1,000 total	Mixed Use with Affordable Housing	\$100 per parcel or \$1,000 total
Proposed Use	Required Price						
Affordable/Mixed Income Housing	\$100 per parcel or \$1,000 total						
Mixed Use with Affordable Housing	\$100 per parcel or \$1,000 total						
PUBLIC FUNDING	Up to \$50,000 per affordable unit (for units at/below 60% of Area Median Income) or a total of \$1,000,000 in DND HOME funding. Furthermore, the project may apply for funds from the Affordable Housing Trust (AHT) or the Inclusionary Development Program (IDP) as is applicable. More information on page 5						
SUBMISSION REQUIREMENTS	Original and three copies each: Proposal Summary & Narrative Proposal Forms in Appendices 1, 3-9 Proposal Checklist Documents More information on page 14						
SUBMISSION DEADLINE	To Bid Counter at DND, 26 Court St, 10 th floor by 4:00PM December 22, 2014 More information on page 14						
DND CONTACT	David West, Housing Development Officer. 617-635-0248, david.west@boston.gov						

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1. SUMMARY STATEMENT

Since its inception in 1966, the Department of Neighborhood Development (DND), formerly the Public Facilities Department, has acted as the primary local government agency charged with providing affordable housing opportunities for the residents of the City of Boston (City). As an agency of the City, established under Massachusetts statute and through the Public Facilities Commission, DND has been directly responsible for the planning, financing and implementation of publicly assisted housing programs. DND has also worked in collaboration with governmental agencies and private entities to educate the community, policy leaders, and various stakeholders about the issues surrounding affordable housing, and identify potential actions to address the affordable housing shortage.

DND applies its resources to the following areas of work:

1. Creating affordable and mixed-income housing;
2. Supporting the preservation of historic architecture;
3. Developing open spaces, including community gardens and farms;
4. Providing homeownership opportunities and trainings;
5. Implementing programs to support the economic development of small businesses.
and
6. Providing homeowners assistance in the upkeep of their homes.

The City, through DND, sells city-owned parcels to private buyers to encourage development in the City. One of the goals of DND's land disposition is to reduce the amount of unused, neglected property existing in the City, placing it back on the tax rolls and adding to the inventory of available housing. DND's land disposition process helps to alleviate the housing crisis by enabling DND to offer buildable lots to home builders/developers to encourage construction of housing in Boston's neighborhoods.

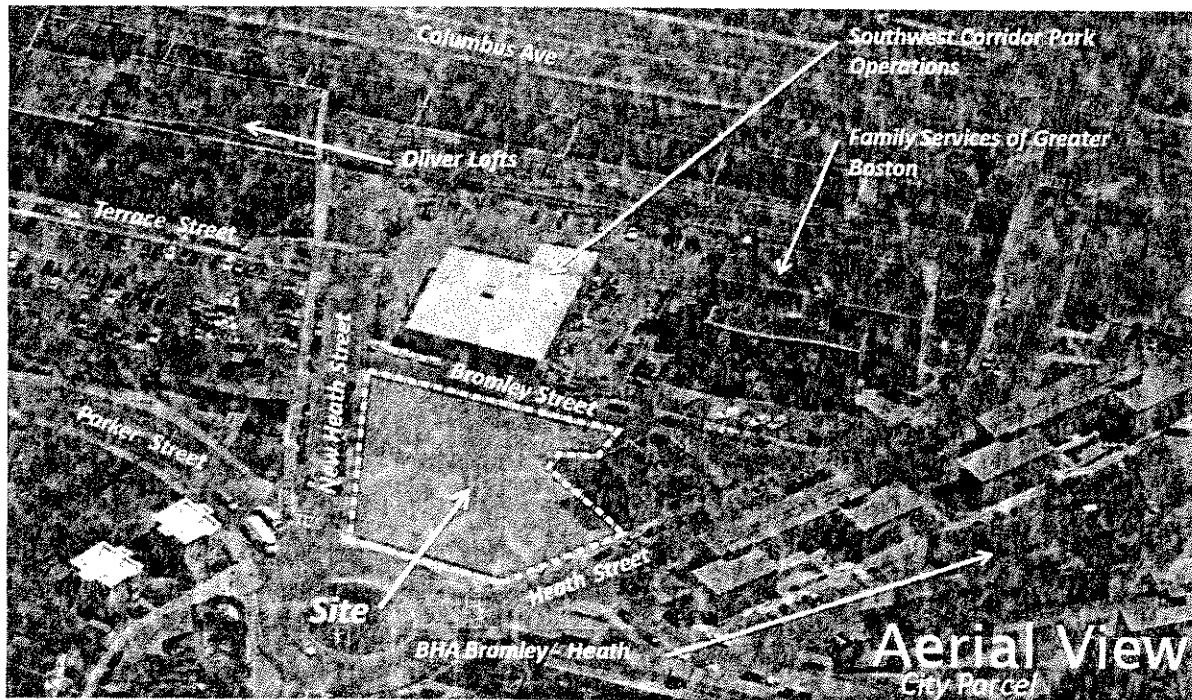
This Request for Proposals (RFP) offers Eligible Applicants an opportunity to submit proposals to acquire and develop parcels of vacant land currently owned by the City located in the Mission Hill neighborhood of Roxbury in Boston. The RFP seeks qualified proposals to develop the parcels for primarily residential purposes, which may also include some commercial, retail or office space.

DND's property disposition process operates in accordance with Massachusetts General Law (M.G.L.), Chapter 30B which governs municipal property dispositions. Accordingly, DND reviews all proposals it receives under this Request For Proposals (RFP), disqualifies any that do not meet the "Minimum Eligibility Criteria" described in Section 8 of this RFP, ranks the remaining proposals according to the General Evaluation Criteria and Compliance Evaluation Criteria set forth in Section 8, and then designates the selected applicant as the tentative developer for the property (i.e., Successful Applicant).

Before offering City property for sale to the public, DND consults extensively with local residents and community leaders to establish a set of guidelines that reflect the community desires regarding preferred, acceptable and unacceptable uses. Those preferences are then incorporated into the RFP.

2. SCOPE OF PROJECT

9-21 Bromley; 894-908 Parker and 58-62 New Heath Streets and 1 Unnumbered Parcel on New Heath Street



PARCEL ID: 1002458000, 1002457000, 1002469000, 1002471000, 1002467000, 1002468000, 1002470000, 1002461000, 1002459000, 1002460000

AREA: 28,872 SF

In this RFP, DND is seeking an eligible applicant to develop these parcels for multi-unit residential affordable rental housing. The proposal may also include office, professional or job creating business uses, as part of the proposed development, according to the development guidelines of this RFP. Proposals must include all parcels listed in the RFP in the development plan. Proposals that do not demonstrate a plan to develop and maintain all of the parcels will be rejected as non-responsive.

This RFP is also offering funding that can be used to support the development of affordable housing on this site. DND will analyze and evaluate the need for subsidy funding to support the construction and long term affordability of eligible rental units as part of a successful proposal. Developers should be aware that maximum DND funding being offered as part of this RFP is up to \$1,000,000 to help support the successful development. The actual amount of funding awarded under this RFP may be less than \$1,000,000 depending upon the DND financial analysis and review of need. DND shall issue a funding award letter to the Successful Applicant. DND's funding award does not preclude the Successful Applicant from applying for additional subsidy resources from the City, which may include but is not limited to the City of Boston's Neighborhood Housing Trust (NHT) and Inclusionary Development Program (IDP) funds. In addition, the Successful Applicant may need to apply to the Department of Housing and Community Development (DHCD) under separate Request for Proposals or Notices of Funding Availability for additional resources to support the proposal development

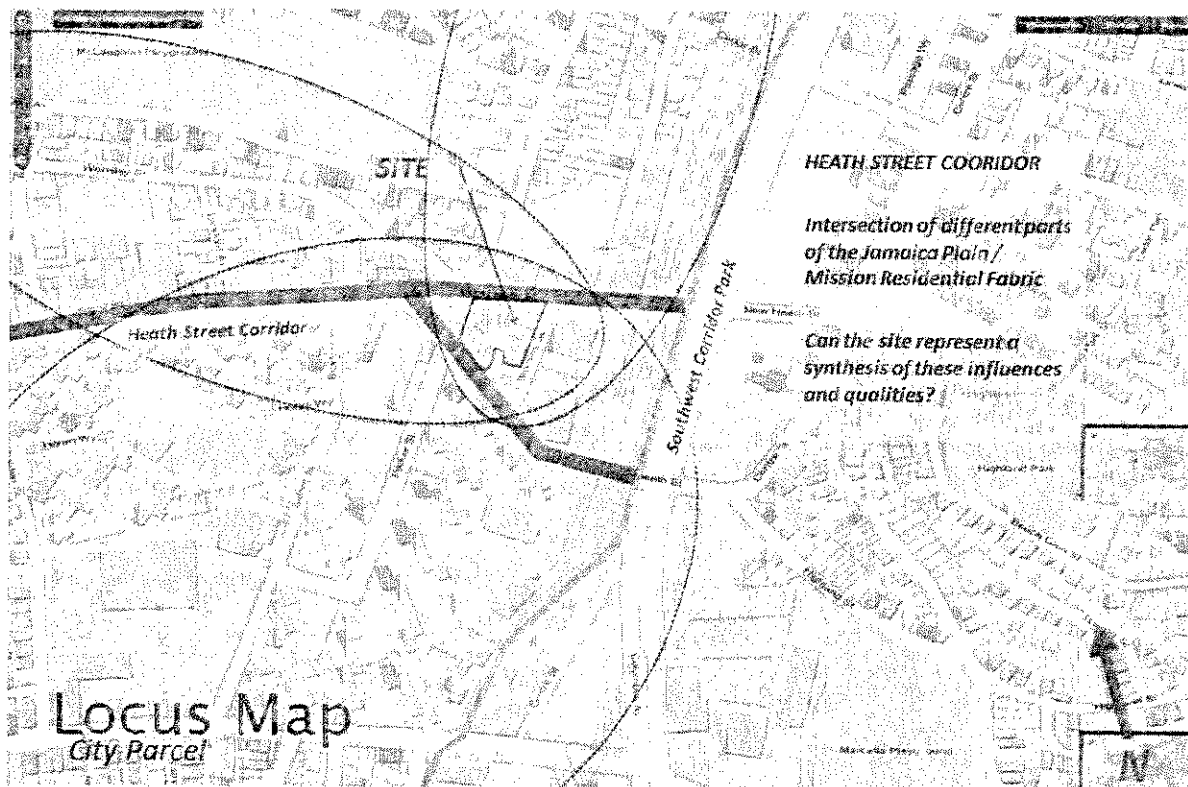
Please contact Christine O'Keefe, DND Senior Development Officer, at (617) 635-0351 for questions regarding NHT or IDP funding.

3. DEVELOPMENT OBJECTIVES

Community Vision

A series of community meetings has shaped the basic outline of the vision for the site. From these meetings, the core goal of the community vision is to strongly encourage development proposals for affordable rental residential housing. To the extent possible factoring in public funding subsidy limits, the community expressed a desire to promote deep affordability in the development. Furthermore, ground floor office, professional and job creating business uses, with residential uses above the ground floor, are also acceptable to the community.

As part of the community vision, there is also community support to enhance neighborhood connections with the development of the site. A core goal of the community vision is to connect new site uses with existing neighborhood uses, to innovatively address building placement and height, open and green space, and parking in the context of the neighborhood fabric.



Existing Conditions

The site is located at the Southwest corridor end of the Heath Street corridor, where New Heath Street and Heath Street split at a rotary, and is defined by Bromley Street at the other end. The City of Boston site is a defining physical element in this location. It is abutted by a four story multifamily building and parking. See site and context photos in Appendix 10.

Context/ Abutting Uses

There are distinct residential types that abut the site on two sides- the Bromley Heath housing development to the south, and a 1-3 Family 3 story residential context to the north along Heath, Wensley and Parker Streets. Mixed into the context are Brewery and Mill type brick buildings. Largely located to the east of the site, some of these buildings have been converted into residential and service uses. Lastly the DCR maintenance building for the Southwest corridor park is located across the street from the site to the east. The site has a diverse context of influences which impact how the site is perceived on each side. It suggests that the site can represent a synthesis of these overlapping influences and qualities.

Use Guidelines

Residential Uses

Multi-unit residential affordable rental housing is to be the primary use for the site.

Commercial & Office Uses

Commercial, professional or business office uses, if proposed, are to be located at the ground floor or lower level of proposed buildings.

Units/Unit Mix

Unit mix should reflect and meet community needs, with an emphasis on family size units, particularly 2 and 3 bedroom. At the same time, the neighborhood has expressed a desire to include some housing units suitable for elderly tenants in the proposed development. As such, proposals that include strong plans for outreach and marketing of the affordable rental project to the elderly are encouraged.

The number of units proposed should be consistent with the RFP principles, and be an appropriate balance with the proposed mix of uses, building height, open space, parking and site context

Affordability/ Income Mix

The community supports a fully affordable housing development. If the proposed development includes 10 or more housing units, DND requires that at least 10% of the units be made affordable to households earning no more than 30% of the Area Median Income (AMI) and that those units be set aside for the homeless (see DND Homeless Set-aside Policy). Furthermore, the community has expressed support for development proposals that provide deep affordability, targeting households at 30%, 50% and 60% of AMI, to the extent financially feasible and using available public subsidies. Finally, applicants may consider including some affordable units at the higher income levels (up to 100% of AMI) if the inclusion of these units will further the project's financial viability and number of lower income units in the plan.

Local Business and Job Opportunities

Redevelopment of these parcels should enhance the local economy and provide both local business and job opportunities. Preference will be given to applications that propose on-site construction and the creation of local jobs. Projects must pursue best efforts to comply with

the Boston Residents Jobs Policy. There is community support for efforts to exceed the policy.

Site Vision & Design Guidelines

Residents support a site plan and building plan that respects the neighborhood context. It was noted the site has different physical contexts- for example, lower buildings in the direction of Wensley Street, and higher buildings in the direction of Terrace Street- that should be considered in site and building design. Similarly, the slope of the site, and traffic patterns, especially at the rotary, were noted and must be considered in site and building planning.

Building Height & Massing

Building height and massing should relate to the adjoining context of buildings which range from 3 to 6 stories. Applicants proposing to exceed current zoning height limits must demonstrate the need, practicality and mitigation of impact on the context.

Configure building height, scale, and massing to relate to the existing buildings or prominent buildings in the site area. The building's massing should take into account the existing street configuration, pedestrian and vehicle traffic patterns.

Orientation & Street Edge

Buildings are to primarily orient towards the street frontages. However, the site as a whole should connect with the surrounding neighborhood and not feel enclosed or privatized. Openings allowing for pedestrian circulation, view corridors, and general connectivity with the neighborhood context and street grid are encouraged. These entries should be inviting and interlink with internal features that serve residents and the community. The relationship of the project to both Bromley Street and the traffic rotary should be considered as well. These features create challenges that the community and DND would like to use this occasion to investigate and explore.

Open Space

Respondents are to provide open space for primary use by the residents and/or businesses. Site design strategies that create productive landscapes – gardens, for example- in association with usable, semi-private passive open space are highly encouraged. At minimum 50% of the passive open space area is to be planted with vegetation. Private and shared outdoor activity spaces are to be provided and could include patio/terraces, gardens and play areas.

Access & Parking

Applicants should creatively design a parking plan that reflects the uses and community vision for the site, takes advantage of the site's topography, and is in appropriate balance with the uses proposed and site context. The City recognizes parking facilities are a significant project cost and seeks to reduce car dependency and ownership. Proposals should seek to promote public health through the use of public transit, walking, and bicycling.

Service & Loading

All service and loading areas should be located off-street and designed to prevent truck back-

up maneuvers in the public right-of-way. Service areas should be out of public view and screened with landscaping and fencing.

Site Landscaping

Provide high quality landscaping throughout the site including drought resistant and native plant materials. Include plantings and ornamental fencing along edges and screening for all mechanical equipment and ventilation openings.

Zoning

The site is currently zoned Multifamily Residential in the Jamaica Plain neighborhood district. The allowed building height is 35 feet and the allowed FAR is 1.0. Multi-Unit Row house and Townhouse building types are encouraged by zoning. Service and Retail uses are not encouraged in this MFR District. Parking ratios vary from .7 to 1.5 per units depending on the number of units. It is expected that proposals for the site will require Boston Redevelopment Authority Article 80 review and approval. The community was open to proposals that would incorporate reduced or shared parking concepts given the sites proximity to the MBTA train stations; however, any such proposal would have to be approved through the zoning approval process.

After DND selection of the developer, required variances to the zoning may be sought, subject to DND and community prior approval, via developer appeal to the Zoning Board of Appeals. The community and DND will evaluate the responses according to their ability to meet the goals of the community vision and Evaluation Criteria in the RFP.

Green Building and Site Design

The residential homes are to be designed and constructed to achieve the most appropriate United States Green Building Council (USGBC) LEED standard at the Silver level or better. Compliance with DND Design Guidelines, including LEED for Homes Silver "Certifiable" (DND certification only, not USGBC certification), Energy Star and Healthy Homes Standards, and the City of Boston Green Building Zoning, Article 37, is required. Green building strategies should include the following:

Innovation

With development costs in mind, project teams are strongly encouraged to utilize both "off-the-shelf" products and practices as well as innovative strategies and "cutting edge" products to increase the sustainability and performance of the building (s). In either case, replicability and ease of use of innovations and best practices for future Boston residential projects of similar scale should be highlighted.

Indoor Environmental Quality

Provide high quality healthy indoor environments by maximizing fresh air indoors and minimizing moisture and exposure to toxins and pollutants. Strategies should include:

- Dry and mold free building designs including extended roof overhangs, proper ground surface drainage and non-paper gypsum board.

- Passive and active fresh air systems and active ventilation at moisture and combustion sources. Building products and construction materials free of VOC's, toxins, hazardous chemicals, pollutants and other contaminants.
- Entryway walk-off mats and smooth floor finishes that reduce the presence of asthma triggers, allergens and respiratory irritants.
- Safe and easily cleaned and maintained built conditions.

Energy Efficiency

Energy efficiency strategies should at minimum include:

- High performance building envelopes that are air tight, super insulated and eliminate thermal bridging with high efficiency windows and doors.
- Energy Star high efficiency appliances and equipment sized to meet but not exceed building needs. Passive (day) lighting strategies and high efficiency lighting fixtures including CFL and LED lighting technology.

Water Efficiency

Use innovative strategies to minimize water use and to reuse storm and waste water including:

- High efficiency low flow bathroom and kitchen fixtures.
- Gray water filtration systems for reuse and ground water recharge.
- Storm water harvesting and onsite ground water recharging.
- Drought resistant planting and non-potable water irrigation.

Connectivity

Encourage and support non personal vehicle means of travel including public transit, walking and bicycling and reduced personal vehicle travel by promoting the use of close by schools, shopping, recreation, and work opportunities. Strategies should include easily accessible bicycle storage space, shared parking, car share program membership and transit pass programs.

Site Construction and Development

Employ low impact construction strategies and management practices to reduce erosion and eliminate construction phase storm water runoff and off-site tracking of soils and construction debris. Include landscaping and other site elements that protect the land support area natural habitats.

Materials Selection

Use materials and resources selected from sustainably harvested, responsibly processed sources. Strategies should include:

- Products made with recycled and reclaimed materials.
- Materials and products from responsibly harvested and rapidly renewable sources.
- Locally sourced products and materials within 500 miles of Boston.

Productive Landscape

Productive landscape is a concept that joins principles and best practices of place-making, sustainability, public space and aesthetics. Productivity is defined as installations, plantings,

activities and utilizations that involve people interacting with the landscape. This includes environmental remediation strategies, and incorporates features such as green roofs, brown roofs, vertical living walls/structures, urban orchards, community gardens, rooftop farms, and solar canopies. The history of the area or site should be understood and considered in the design of the building and of the site, and associations that are meaningful should be incorporated. The site should welcome the public and organic connections should be made with the surrounding formal and informal infrastructure - paths, walkways, sidewalks, open space, parks and public transportation. Steps should be taken to make the site an enjoyable aesthetic and communal experience including fashioning exterior features and elements in an engaging manner, utilizing materials and greenery inventively, and incorporating art installations, performances and other participatory community activities as are suitable to specific sites.

More information about the neighborhood is available at:
www.cityofboston.gov/neighborhoods.

4. PROJECT REQUIREMENTS

General:

- i. The offer price for proposals which must have an affordable housing component that requires DND subsidy is \$100 per parcel or \$1,000 total. Proposals that do not offer the offer price amount will be deemed non-responsive and will be disqualified from further consideration.
- ii. While DND has conducted a title examination of the property, DND makes no warranty or representations as to its accuracy and recommends that Successful Applicants conduct their own title examinations.
- iii. If selected as a finalist, Applicants will be required to present their plan of development at a community meeting organized by DND.
- iv. Performance under this Request for Proposals will be closely coordinated with the Development Officer and any other staff member designated by DND. Questions pertaining to requests for technical guidance and direction should be directed in writing to the assigned Development Officer, or other designated DND representative. However, such DND representative(s) will only provide necessary background information and guidance; they will under no circumstances change the terms and conditions of this RFP.
- v. The Successful Applicant is expected to prepare and deliver to their assigned DND Development Officer a monthly status report. The report must include a description of the work completed that month regarding, but not limited to, the following:
 1. Zoning Board of Appeal (ZBA) Application(s)
 2. Inspectional Services Department (ISD) Permit(s)
 3. Final Design Specifications
 4. Environmental Testing or Remediation
 5. Acquisition of Financing

6. Community Feedback

- vi. The Successful Applicant shall designate qualified representatives as point of contact to assist DND, as needed, throughout the engagement. Names, phone numbers, and e-mail addresses of proposed representatives are to be listed in the proposal.

Developmental:

- i. The Successful Applicant will produce an appropriate plan of development that satisfies the City's requirements within specified time frames. See Development Objectives.
- ii. The contract period of performance shall be for twelve (12) months from the tentative designation award. If the Property has not been made development-ready within twelve (12) months, DND may choose to grant additional time for performance or to rescind the award, at its discretion.
- iii. The determination of whether services were performed satisfactorily is at the sole discretion of DND.
- iv. The Successful Applicant will confirm all scheduled project milestones with DND prior to initiating work.
- v. For entering Sources and Uses of Funds, operating budget and other budget items, Proposers must use a One-Stop Application format that can be downloaded from www.mhic.com (in the site, see tab "One Stop Center" then "Downloads" then "OneStop2000"). All cost line items must be included in the budget. If the proposal includes a combination of unit types for different income categories, the developer may be required to submit a separate budget that illustrates that the costs associated with the development of the different income levels are covered by eligible sources. Sources must equal uses. If applicable, land costs for privately owned parcels that would be included in the proposed development must be identified in the "Acquisition" line. At the time of application to DND, the applicant must have an accepted offer to purchase, an executed purchase and sale agreement or a deed and the price must be supported by an as-is appraisal for that property.
- vi. Construction Cost. Proposers are required to provide a General Contractor estimate for hard costs at the time of application.
- vii. Site Work. The Successful Applicant is responsible for typical urban site redevelopment costs and these costs must be clearly itemized and carried in the hard cost budget. Base the cost of site work and grading on all foreseeable (known) site dimensions, topography and visible ledge described in the RFP, including what is evidenced on site. Include all site work including grading in your construction costs. Include in the development budget all fees and costs associated with street and sidewalk reconstruction, curb cuts and street opening permits (these permits should be applied for at least 6-8 weeks before November 15th, and should be coordinated through DND). Contact the Public Works Department at (617) 635-4909, 4910 or 4911 for information regarding these items. Furthermore, costs of cutting and capping existing underground utility lines are the responsibility of the developer and must be included in the development budget. Contact Boston Water and Sewer Commission at (617) 989-7000 for information regarding this requirement.
- viii. Environmental Site Costs. Proposers shall include in the proposal a hard cost line item allowance to cover environmental remediation costs. This should be included separate from the "direct construction" line in the "Construction" subtotal category. Furthermore, a

soft cost line item allowance should be included for additional testing and engineering services. Proposers should provide an explanation of how the cost was determined. DND reserves the right to remove a site(s) as a result of remediation costs.

- ix. Hard and Soft Cost Contingency. Provide a hard cost contingency of 5%, based on total construction costs. Assume a soft cost contingency of 2.5% based on total soft costs.

Design

- i. Successful Applicants are required to comply with DND Residential Design Standards and Development Objectives for the site (See Section 3).
- ii. Applicants must propose a development design scheme that addresses site and design information provided in this RFP with schematic designs for the siting, massing, unit configuration, non-residential program, open space, parking, etc. Variations of the zoning requirements will be considered for project proposals that offer an appropriate and reasonable design approach that is consistent with building context and neighborhood character and is consistent with the RFP design standards.
- iii. Building materials must be of good quality and take advantage of sustainable building principles and MEP systems.
- iv. Applicants must present a design that includes a thoughtful exterior, with attractive windows, doors, and exterior cladding and/or masonry.

Operational:

- i. Affordability. The community supports a fully affordable housing development. If the proposed development includes 10 or more housing units, DND requires that at least 10% of the units be made affordable to households earning no more than 30% of the Area Median Income (AMI) and that those units be set aside for the homeless (see DND Homeless Set-aside Policy). Furthermore, the community has expressed support for development proposals that provide deep affordability, targeting households at 30%, 50% and 60% of AMI, to the extent financially feasible and using available public subsidies. Finally, respondents may consider including some affordable units at the higher income levels (up to 100% of AMI) if the inclusion of these units will further the project's financial viability and lower income targeting.
- ii. Homeless Set Aside. Developments with greater than 10 units must set aside a minimum of 10% of the units for homeless or formerly homeless households. Developments with 5 or greater homeless units must submit a detailed service plan to support this population. The set aside applies to both new production and preservation proposals.
- iii. Operating Budget: Applicants must indicate all income, expenses and reserves using the 1 Stop budget format. Include the 20 year Operating Budget.
- iv. Wages. If the Successful Applicant is a for-profit firm with 25 or more full time employees, or a non-profit firm with 100 or more employees, you will be required to make best efforts to adhere to the Boston Jobs and Living Wage Ordinance, and the provisions of the Promulgated Regulations, including the "First Source Hiring Agreement" provisions of said Ordinance. The Successful Proposer shall maintain a safety and environmental program that complies with all applicable local, state and federal regulations. The Successful Proposer will be ultimately responsible for the condition of the property. They must take any steps necessary to keep the property free

of trash, debris, and snow. NOTE: DND reserves the right to change the number of affordable units and other aspects of the development program outlined in this RFP depending on the needs of the development, provided that the rights of the Successful Proposer and other applicants are not prejudiced.

5. SUBMISSION INSTRUCTIONS

Proposers MUST submit one (1) original and three (3) copies of the proposal in a sealed envelope, clearly marked "Bromley, New Heath and Parker Streets RFP Application", to the Department of Neighborhood Development, Bid Counter (either in person or by mail) by **December 22, 2014 at 4:00 p.m.**

26 Court Street, 10th Floor
Boston, MA 02108

Bid Counter hours are Monday–Friday from 9:00 a.m. - 12:00 noon and 1:00 p.m. - 4:00 p.m. The Bid counter is closed Monday through Friday from 12 noon to 1:00 p.m. and after 4 p.m. Please plan accordingly.

Any proposals received after the date and time specified in this RFP will be rejected as non-responsive, and not considered for evaluation.

6. REQUIRED SUBMISSION DOCUMENTS

The following is a list of all documents necessary for a complete proposal. Submitting these documents in the order listed below will facilitate the City's ability to determine if your application is complete and eligible for further review. Incomplete proposals will be rejected.

Introductory Documents:

- i. Appendix 1: Cover Sheet Form
- ii. Appendix 2: Proposal Checklist
- iii. Proposal Summary

General Evaluation Criteria Documentation:

- i. Appendix 3: Statement of Proposer's Qualifications Form
- ii. Appendix 4: Development Timetable Form
- iii. Appendix 5: Construction Employment Statement Form

Compliance Review Documentation:

- i. Appendix 6: Property Affidavit Form
- ii. Appendix 7: Affidavit of Eligibility Form
- iii. Appendix 8: Chapter 803 Disclosure Statement Form
- iv. Appendix 9: Beneficial Interest Statement Form

7. PROPOSAL SUMMARY

In addition to the required forms listed in Section 7, the following information must be included in the application. This is an opportunity for the Applicant to convey, in their own words- and with backup documentation and material- to the Evaluation Team how the proposed project will be a highly-beneficial use of the Property, cost-effective, timely, and provide options superior to those currently available to the community. Omission of any of the required information may lead to a determination that the proposal is non-responsive.

Introduction

- i. A narrative introduction to the Applicant and Proposal that includes a statement of the Applicant's interest in Project, and overview of the proposal.
- ii. Provide a description of the organizational structure, including a list of qualified representatives and key personnel and the roles and responsibilities of each party.
- iii. A description of any lawsuits brought against the Proposer or principals in courts situated within Massachusetts within the past five years.

Development Plan

- i. Applicants must indicate and fully explain their plan for development and how it coincides with the Project Requirements and the vision for the site outlined in this RFP. Also, Applicant must provide a credible plan for accomplishing its stated goals and/or objectives.
- ii. A time line schedule proposed to meet the tasks listed in Section 10.
- iii. One Stop Application Development Budget as outlined in Section 4.
- iv. A financing letter of interest or a commitment letter to fund from an established financial institution, including letters of interest from tax credit equity providers.
- v. Provide copies of plan drawings that best represent your proposed plan and respond to the Development Objectives. Residential components are required to comply with DND's Residential Design Standards. **These standards can be found on the DND website:**

http://www.cityofboston.gov/dnd/PDFs/14-1_Design_Standards-Final-August-2014.pdf

Applicant design drawings will also be available to the public to assist in their assessment of your proposal.

- vi. Design submission requirements are outlined in Appendix 11. Include 1 digital (CD) copy of the schematic design drawings and outline specifications.
- vii. Include narrative and description of Green Building elements; LEED for Homes checklist and HERS index, and site measures that address "productive landscape".

Operational Plan

- i. Summarize the operating plan of the facility once development is complete. Include the Operating Budget as outlined in the One Stop budget, including a 20 year operating budget.

Developer Qualifications, Experience and References

- i. Furnish a narrative supported by relevant data regarding qualifications and past experience with similar projects. Applicant must provide detailed description of previous

relevant work completed and the results or outcome of that work. Each Applicant shall also furnish three current references including, names, addresses, e-mail addresses, phone numbers, and principal contacts.

- ii. Resumes of development team members.

Permits/Licenses

- i. The Proposer must include a list of relevant business permits/licenses (with expiration dates) for development projects in planning.

Subcontractors or Partnerships

- i. If applicable, explain the relationship(s) between the Applicant and any third-party developers, subcontractors, or other partners that might influence the Applicant's development plan.

8. EVALUATION PROCESS

Proposals will be reviewed and selected using a 3-part process.

First, proposals must meet the City's Minimum Eligibility Criteria as described below. The Selection Committee shall then assign a composite rating for each proposal it evaluates. Proposals that satisfy the Minimum Eligibility Criteria will then be reviewed based on the General Evaluation Criteria. To facilitate DND's evaluation of General Evaluation Criteria, DND may require that Proposers present their plan of development to the community.

The most advantageous proposal from a responsive and responsible applicant, taking into consideration all evaluation criteria, will be selected.

Prior to Developer Designation by the Public Facilities Commission, the Successful Applicant will be subject to a final Statutory Compliance Review to determine compliance with various City regulations, ordinances and policies.

Minimum Eligibility Criteria ("Responsive" Applicant):

- i. **Proposal Received by Deadline.** Only proposals that are received by the date, time, and at the location indicated in Section 5 of this RFP will be accepted.
- ii. **Offer Price.** Only proposals including affordable housing and have an offer price equal to the Offer Price as described in Section 4 of this RFP will be accepted.
- iii. **Complete Proposal Submission.** Proposals must contain all necessary forms and documents as required in Sections 6 and 7 of this RFP, including all required signatures and certifications.
- iv. Proposals that comply with the Development Guidelines outlined by this RFP.

General Evaluation Criteria ("Responsible" Applicant):

- i. **Developer Experience and Capacity.** This is an evaluation of Applicants experience, along with the experience and capacity of identify team members in developing projects of a nature comparable to the given project.
- ii. **Plan of Development.** This is an evaluation of the proposed uses and redevelopment of the property, including all major physical changes to the property and the planned end use of the property

- iii. **Design Concept.** This is an evaluation of how well the proposal incorporates the Design Requirements set out in Section 3, and whether the Applicant's design proposal appears to be reasonably attainable.
- iv. **Development Cost Feasibility.** This evaluation is based on the strength of the Development Budget. DND will assess projected development expenses, including site prep, environmental remediation expenses, construction and all associated soft costs, and will determine whether, in its opinion, the stated cost of development is sufficiently inclusive and reasonable.
- v. **Developer's Financial Capacity.** This is an evaluation of Applicant's ability to secure, in a timely manner, all financing stated in their Development Budget. DND reserves the right to deny funding to any applicant whom it determines is not credit worthy or bankable.
- vi. **Operational Plan.** This is an evaluation of how well the proposal meets the Operational Requirements set out in Section 4.
- vii. **Property Management and Maintenance Feasibility.** This evaluation is based on the relative strength of the proposed operating budget to identify and address all reasonable operating expenses and the relative capacity of the Applicant to manage and maintain the property.
- viii. **Development Schedule.** This is an evaluation of the Applicant's planned Development Timetable, relative to other proposals. The total construction time (from developer selection to completion) will be an important evaluation factor.

Compliance Review ("Disqualifiers"):

- i. **Tax Delinquency Review.** The City of Boston Collector-Treasurer's Office will conduct a review of the selected proposer's property tax history. The Successful Applicant cannot be delinquent in the payment of taxes on any property owned within the City of Boston. The Successful Applicant must cure any such delinquency prior to the Tentative Designation of the Property. If the Successful Applicant has been foreclosed upon by the City of Boston for failure to pay property taxes, then said applicant will be deemed ineligible for Tentative Designation of the Property offered pursuant to this RFP, unless such applicant promptly causes the decree(s) or judgment(s) of foreclosure to be vacated by the Land Court and the City made whole. DND, in its sole discretion, shall determine the timeliness of the Successful Applicant's corrective action in this regard and will disqualify the applicant if vacating the tax-title foreclosure is not prosecuted expeditiously and in good faith, so as to avoid undue delay.
- ii. **Water and Sewer Review.** The City of Boston Water and Sewer Commission will conduct a review of the Successful Applicant's water and sewer account(s). The Successful Applicant cannot be delinquent in the payment of water and sewer charges on any property owned within the City of Boston and, if found to be delinquent, must cure such delinquency prior to a vote request to the Public Facilities Commission for Tentative Designation of the Property.
- iii. **Property Portfolio Review.** The City will review the Successful Applicant's portfolio of property owned to ascertain whether there has/have been abandonment, Inspectional Services Department (ISD) code violations or substantial disrepair. If unacceptable conditions exist in the Successful Applicant's property portfolio, DND may deem the Successful Applicant ineligible for Tentative Designation of the Property.

- iv. **Prior Participation Review.** The City will review the Successful Applicant's prior participation in any City of Boston programs, including DND programs, to ascertain Successful Applicant's previous performance. Applicants found to have not fulfilled their duties or obligations under previous agreement with the City may be deemed to be ineligible for Tentative Designation of the Property.
- v. **Employee Review.** Neither the Successful Applicant, nor any of the applicant's immediate family, nor those with whom s/he has business ties may be currently, or have been within the last twelve (12) months, an employee, agent, consultant, officer, or an elected official of the City of Boston, including DND. An "immediate family member" shall include parents, spouse, siblings or children, irrespective of their place of residence. If the Successful Applicant fails to satisfy this requirement they may be deemed to be ineligible for Tentative Designation of the Property.
- vi. **Equal Opportunity Housing.** The City administers its programs in accordance with federal, state and local equal opportunity and fair housing laws, regulations and requirements. This includes affirmatively furthering fair housing and providing equal access to information about development opportunities.
- vii. **Fair Housing Review.** The Boston Fair Housing Commission will screen applicants for the property offered pursuant to this RFP. The Successful Applicant must not have any unresolved housing discrimination complaints or convictions for violating fair housing laws.

9. COMMUNITY PARTICIPATION

DND has standard community participation policies and procedures. These are designed to:

- ☐ Ensure that community residents and local leaders are fully informed about the sale of any real estate sold by DND.
- ☐ Create a uniform and timely structure for this process so that developers and residents alike have a clear understanding of how the process works, enabling both to more effectively plan for and participate in the project development process; and
- ☐ Promote equal opportunity and fair housing in the disposition of residential sites.

DND works closely with neighborhood groups and local residents in new construction projects involving city-owned property. This involvement calls for substantial participation by the neighborhood at all stages of planning. The planning disposition and development process includes the following steps:

- ☐ **Planning Meetings:** DND staff holds public meetings with neighborhood residents and abutters to discuss use options and other development criteria for the parcels.
- ☐ **Developer Presentation:** DND holds a public meeting for the developers whose RFP submissions meet Minimum Eligibility Criteria to make detailed presentations to the neighborhood in order to receive comment and recommendations on their proposals.
- ☐ **Qualified Developer Selected:** DND, based on its review of applications against Evaluation Criteria, as set forth in Section 7, will recommend and select the developer through the Public Facilities Commission.

10. AWARD OF CONTRACT AND DEVELOPMENT SCHEDULE

The City, acting by and through its Public Facilities Commission by the Director of DND, is requesting proposals for the acquisition and development of property located at 9-21 Bromley, 894-908 Parker, 58-62 New Heath, 1 Unnumbered Parcel on New Heath. The City will award a contract to the highest-rated, most advantageous proposal based on the above-listed criteria.

Proposal Review

DND staff review of proposals will begin promptly after the submission deadline. If the proposal does not meet the Minimum Eligibility Criteria of the RFP, DND shall terminate further consideration of the proposal. In the event of minor informalities in a proposal, DND may attempt to seek clarification in order to determine whether it meets Minimum Eligibility Criteria, but reserves the right to declare the proposal non-responsive.

DND staff may interview proposers to solicit clarifying information on their proposal and on their ability to finance and complete the project. Further evaluation may include site visits to other buildings constructed by the Proposer, a review of references, and/or examination of additional financial or design information.

DND reserves the right to award contracts to multiple Proposers, to reject any or all proposals, to waive any informality in the proposal process, or to cancel in whole, or in part, this solicitation if it is in the best interest of the City to do so. A proposal may be rejected if it is incomplete, illegible, or conditional.

DND reserves the right to obtain opinion of Counsel regarding the legality and sufficiency of proposals. The contract will be awarded, if at all, to the responsive, responsible Proposer(s) that receives the highest overall composite rating in the evaluation process.

Developer Designation

DND staff will recommend a developer to the Director of the Department of Neighborhood Development, based on its review of proposals against Evaluation Criteria set forth in Section 8. In turn, the Director will make a recommendation to the Public Facilities Commission which, if in agreement, will vote a designation of "Tentative Developer."

Following tentative developer designation, all applicants will be notified of their status. DND will outline conditions of the tentative Developer Designation in a letter to the Successful Applicant. DND staff will work with the Successful Applicant to meet and finalize development tasks and timelines outlined in the Developer Designation letter. Upon successfully meeting Developer Designation tasks, DND staff will recommend a property Conveyance to the Director of DND. In turn, the Director will make a recommendation to the Public Facilities Commission which, if in agreement, will vote a Conveyance of the property. DND's legal counsel will then prepare all necessary conveyance documents. Each property will be conveyed "AS IS" and without warranty or representation as to the status or quality of title. The purchaser shall to the fullest extent permitted by law assume any and all liability for the property, including that liability related to environmental remediation under Chapter 21E of the Massachusetts General Laws.

Marketing

The Successful Applicant is responsible for all marketing tasks associated with the rental of the units, including Income certifications to determine income eligibility for all proposed tenants, and meeting all DND policies and funding requirements

The Successful Applicant must identify the marketing agent, if any, and outline the marketing plan for the development and demonstrate that the units will be affirmatively marketed and that a fair and open process for tenant selection will be followed.

Successful Applicants are also required to list the availability of rental opportunities with the BFHC Metrolist.

- i. Affirmative Marketing and Tenant Selection. Developers of 5 or more units for rent or for sale are required to submit an Affirmative Marketing and Tenant Selection Plan to the Boston Fair Housing Commission (BFHC). The plan must be approved by the BFHC prior to project closing.
- ii. Metrolist. Developers of newly created units which will be available for rent are required to list the availability of such housing with Metrolist.

NOTE: Notwithstanding any applicant efforts and discussions with City or State agencies regarding Project Based Vouchers (PBV), or other rental support, unless the applicant has a commitment for PBV or other rental support, the **applicant must not mention, or imply by certain language, its plan in the application submittal.**

Development Schedule

Below is the predetermined Development Schedule. The Successful Applicant's failure to meet these established benchmarks may be grounds for de-designation of the project. Should this occur, DND reserves the right to assume any and all contracts associated with the project.

TASK	DATE
RFP Available at DND Bid Counter	10/6/14
Proposal Submission Due Date	12/22/14
DND Presents Eligible Applicants to Community	January 2015
PFC Tentatively Designates Developer	February 2015
Article 80 Approval	Spring 2015
Zoning Board of Appeal Hearing	Summer 2015
DHCD Application for Funding	Fall 2015
DHCD Funding Award	Winter 2015
Construction Bidding/Contractor Selection/Cost Finalization	Spring 2016
Financing/Permitting Secured	Spring 2016
BFHC Approval and Other Marketing Requirements Complete	Spring 2016
Closing	Summer 2016
Construction Begins	Summer 2016

Construction Completed	Summer 2017
Full Development Lease Up	Fall 2017

11. WITHDRAWAL OF PROPOSALS

Proposals may be withdrawn either personally, by written request or by electronic request at any time prior to the scheduled closing time of receipt of proposals.

12. QUESTIONS

The DND contact is David West; his contact information is listed below.

Phone: (617) 635-0248

E-mail: David.west@boston.gov

U.S. Mail: Department of Neighborhood Development

Attn: David West, Housing Development Officer

26 Court Street, 8th Floor
Boston, MA 02108

Disclaimer: DND will attempt to communicate any changes/addenda to this RFP; however, it is the Proposer's responsibility to check the DND's website regularly for any updates, corrections or information about deadline extensions.

13. TERMS AND CONDITIONS

- i. **Assumption of Risk.** The City accepts no financial responsibility for costs incurred by Proposers in responding to this Request for Proposals. Proposers are responsible for any and all risks and costs incurred in order to provide the City with the required submission.
- ii. **Public Property.** Proposals submitted to DND will become property of the City. After opening, all proposals become public documents and are subject to the requirements of the Massachusetts Public Records Law (M.G.L. c. 4, § 7(26)).
- iii. **Terms of Sale.** After a final proposal has been selected, the Successful Applicant will be contacted by DND to finalize the terms of the sale. The terms of the sale will and MUST be consistent with this Request for Proposals, including the advertised purchase price and Project Requirements.
- iv. **"As Is" Conveyance.** DND will convey the property in "AS IS CONDITION" without warranty or representation as to the status or quality of title. The Successful Applicant shall, to the fullest extent permitted by law, assume any and all liability for environmental remediation pursuant to Chapter 21E of the Massachusetts General Laws. Finally, any and all site improvements, such as utility connections and/or street repairs, are the responsibility of the Successful Proposer.
- v. **Negotiations.** DND reserves the right to negotiate for changes to the selected proposal. These negotiations may encompass values described in the Request for Proposal, as well as values and items identified during the Request for Proposal and negotiation process. On the basis of these negotiations, DND may decline to sell the property even after the

selection process is complete and negotiations have begun.

- vi. Closing. The Successful Applicant must execute a Purchase and Sales Agreement and then close on the sale within ninety (90) days of the date of execution, unless otherwise agreed upon (in writing) by DND. Failure to comply with the obligations of closing may result in the rescission of any prior agreement(s) with DND regarding the Property.
- vii. Restrictions on Transfer. Unless authorized in writing by DND, the Successful Applicant may not substantially alter the use of the property; permanently cease operations; transfer title of the property; or have any unauthorized financial liens placed on the property. Such actions will trigger a reversionary clause in the deed, automatically transferring title of the Property back to DND.
- viii. Payment. Unless otherwise agreed to by DND in writing, the Successful Applicant is required, at the time of conveyance, to make full payment for the Property by Treasurer's or Cashier's Check. In addition, the Successful Applicant will be responsible for paying all recording and registrations fees (including the cost of recording the deed and conveyance documents at the Suffolk County Registry of Deeds), and making a pro forma tax payment.
- ix. Reservation of Rights. DND reserves the right to postpone or withdraw this RFP; to accept or reject any and all proposals; to modify or amend the terms of this RFP through an addendum; to waive any informality, and to interview, question and/or hold discussions regarding the terms of any proposal received in response to this RFP. DND reserves the right to cancel a sale for any reason. DND reserves the right to select the next highest ranked proposal, if the initially Successful Applicant is unable to proceed in a timely manner or otherwise fails to satisfactorily perform. DND reserves the right to waive any requirement or restriction set forth in this RFP or conveyance documents, if such waiver is deemed appropriate by DND, in its sole discretion.
- x. Changes to Program. DND reserves the right to change aspects of the development program outlined in this RFP, using its best judgment as to the needs of the program and the furtherance of its mission, provided that the rights of the Proposers are not prejudiced.

**DND THANKS YOU FOR YOUR
INTEREST**

Appendix 1 – Cover Sheet Form

SOLICITATION, OFFER AND AWARD			
1. PROJECT NAME	2. TYPE OF SOLICITATION	3. Date Issued	
Bromley, New Heath and Parker Streets	Invitation for Proposals Negotiated (RFP)	October 6, 2014	
4. ISSUED BY: City of Boston, Department of Neighborhood Development 26 Court Street, 8 th Floor Boston, MA 02180		5. ADDRESS OFFER TO: (If other than item 4)	
NOTE: In sealed bid solicitations "offer" and "offeror" mean "bid" and "bidder"			
SOLICITATION			
6. Sealed proposals (original and 3 copies) will be received at the place specified in item 4 until 4:00 p.m. (EST) December 22, 2014. CAUTION: Late Proposals, Modifications, and Withdrawals: See Section 10. All offers are subject to all terms and conditions contained in this solicitation.			
7. For Information Contact:	7a. Name	7b. Telephone	7c. Fax
	David West	(617) 635-0248	(617) 635-0383
			7d. E-mail David.west@boston.gov
OFFER			
8. In accordance with the terms of this RFP, the undersigned agrees, if this offer is accepted, to furnish any and all supporting documentation upon request by DND.			
OFFER PRICE:			
9. SUBMISSION CHECKLIST			
	Appendix 1: COVER SHEET FORM		Appendix 7: AFFIDAVIT OF ELIGIBILITY
	Appendix 2: PROPOSAL CHECKLIST		Appendix 8: CHAPTER 803 DISCLOSURE STATEMENT
	Appendix 3: STATEMENT OF PROPOSER'S QUALIFICATIONS		Appendix 9: DISCLOSURE/BENEFICIAL INTEREST STATEMENT
	Appendix 4: DEVELOPMENT TIMETABLE FORM		
	Appendix 5: CONSTRUCTION EMPLOYMENT STATEMENT		OTHER GENERAL SUBMISSION REQUIREMENTS IN APPENDIX 2
	Appendix 6: PROPERTY AFFADIVIT		
10. ADDRESS OF OFFEROR		11. Name and Title of Authorized Signatory (Print)	
		12. Signature	13. Offer Date
14. Phone Number			

Appendix 2 – Proposal Checklist

General Submission Requirements:

- 1 original and 3 application copies submitted
- Appendix 1: Cover Sheet Form
- Appendix 2: Proposal Checklist
- Proposal Summary and Narrative
- Appendix 3: Statement of Applicant's Qualifications Form
- Appendix 4: Development Timetable Form
- Appendix 5: Construction Employment Statement Form
- Appendix 6: Property Affidavit Form
- Appendix 7: Affidavit of Eligibility Form
- Appendix 8: Chapter 803 Disclosure Statement Form
- Appendix 9: Disclosure/Beneficial Interest Statement Form
- Pre-Development Sources and Uses Budget (w/ proof of cash availability)
- One Stop Application for Development Budget- Use Sections 1-7, including "Project Summary Information", "Rent Profile Analysis", "21-Year Operating Proforma" and "Operating Expense Analysis" and Development Cost Analysis"
- Evidence of Financing- Letter of Interest or Commitment Letter from an established Financial Institution
- Evidence of Acquisition of Privately-owned Land, if applicable
- Audited Financial Statement (most recent)
- Resumes of Development Team
- Design Submittal including 2 Full Plan Sets, Outline Specifications and 1 digital CD of the schematic design and outline specifications (see Appendix 11).
- LEED Checklist demonstrating LEED Silver "Certifiable" strategy
- Green Narrative that addresses, at a minimum, Integrated Design Process, Green and LEED Silver "Certifiable" strategy and sources of green funding
- Detailed Service Plan to support population served in Homeless Set Aside.

Appendix 3 STATEMENT OF PROPOSER'S QUALIFICATIONS FORM

All questions must be answered. All information must be clear and complete. Attach additional pages, if needed.

1. Name of proposer: _____

2. Names and titles of principals: _____

3. Names of authorized signatories: _____

4. Permanent main office address: _____

Phone: _____ Fax: _____ Email: _____

5. Date organized: _____

6. Location of incorporation: _____

7. Number of years engaged in business under your present
name: _____

8. List at least three private or public agencies that you have supplied/provided with similar
services to that in this solicitation:

a. _____

b. _____

c. _____

Has organization ever failed to perform any contract? ☐ YES ☒ NO
If YES, attach a written declaration explaining the circumstances.

AUTHORIZATION: The undersigned certifies under penalties of perjury that this proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of individual submitting proposal

Title

Legal Name of Organization

Date

Appendix 4 DEVELOPMENT TIMETABLE FORM

PROPOSER'S NAME: _____

Assuming that you are designated on _____ *, indicate below your target dates for achieving*
these key development milestones.

MILESTONE	DATE
Designs Complete	
Apply for Permit(s)	
Zoning Relief Anticipated?	<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO
All Development Financing Committed	
Permit(s) Issued	
Financing Closed	
Construction Begins	
Construction Complete	

Appendix 5 CONSTRUCTION EMPLOYMENT STATEMENT FORM

PROPOSER'S NAME: _____

How many full time employees does your firm currently have? 27

☐ Under 25 ☐ 25 -99 ☒ 100 or more

Are you a Boston-based business? ☐ YES ☒ NO

Boston Based: where the principal place of business and/or the primary residence of the Proposer is in the City of Boston.

Are you a Minority-owned Business Enterprise? ☐ YES ☐ NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)? ☐ YES ☒ NO

Are you a Woman-owned Business Enterprise? ☐ YES ☒ NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)? ☐ YES ☒ NO

RESIDENT, MINORITY AND FEMALE CONSTRUCTION EMPLOYMENT

DND encourages MIHI builders to seek to achieve the following construction employment goals:

Boston Residents	50% of project hours
Minority	25% of project hours
Female	10% of project hours

These are targets, not requirements, but proposals that provide better evidence of their ability to achieve these targets will be more highly ranked. Explain what actions you will undertake to promote employment of these groups:

If you have additional information demonstrating your capacity to achieve these employment targets, you may provide this information on a separate sheet clearly labeled at the top with "Supplementary Construction Employment Statement" and the Proposer's name. *Note: if you are, according to the US Dept. of Housing & Urban Development, a Section 3 certified vendor, this will be considered strong evidence of capacity to achieve DND's employment goals.*

If you have completed any development projects in the last five years that have required employment reporting through the City's Office of Jobs & Community Services, please list the most recent here:

Appendix 6 – Property Affidavit

City of Boston – Department of Neighborhood Development Property Affidavit Form

Instructions: List all City of Boston properties currently owned, or previously foreclosed upon for failure to pay real estate taxes or other indebtedness, by the applicant or by any other legal entity in which the applicant has had or now has an ownership or beneficial interest.

For any additional properties that do not fit on this form, attach a spreadsheet. (Do not use another loops form. Only one typed signature page should be submitted.)

Applicant: _____

List Addresses of Boston Properties Owned	PARCEL ID #
Boston Properties Previously Foreclosed Upon by COB	PARCEL ID #
Are you including any additional properties on an attached spreadsheet?	
<input checked="" type="radio"/> YES <input type="radio"/> NO	

By entering my name below, I declare under penalty of perjury that the foregoing representations are true, complete, and correct. I understand that failure to disclose any properties or financial interests, as described above, shall make voidable any agreements or contracts subsequently made with the City, will result in disqualification of any application(s) to obtain assistance or property from the City, and may result in prosecution.

_____ Type name	_____ Date
_____ Applicant Contact (if different from above)	_____ Telephone Number

For Official Use Only (to be completed by City of Boston staff)

DND PM, Division, & Project _____

DND A&F Division Review Y\$ _____ N ☐

Signature & Date: _____

Notes: _____

Public Works Department Y\$ _____ N ☐

Signature & Date: _____

Notes: _____

Treasury Department Y\$ _____ N ☐

Signature & Date: _____

Notes: _____

Boston Water & Sewer Commission Y\$ _____ N ☐

Signature & Date: _____

Notes: _____

AFFIDAVIT OF ELIGIBILITY FORM

Developer's Name: _____

Any person submitting an application for under this RFP must truthfully complete this Affidavit and submit it with their application.

1. Do any of the principals owe the City of Boston any monies for incurred real estate taxes, rents, water and sewer charges or other indebtedness?

2. Are any of the principals employed by the City of Boston? If so, in what capacity?
(Please include name of principal, name of agency or department, and position held in that agency or department).

3. Were any of the principals ever the owners of any property upon which the City of Boston foreclosed for his/her failure to pay real estate taxes or other indebtedness?

5. Have any of the principals ever been convicted of any arson-related crimes, or currently under indictment for any such crime?

6. Have any of the principals been convicted of violating any law, code, statute or ordinance regarding conditions of human habitation within the last three (3) years?

Signed under the pains and penalties of perjury this

_____ day of _____, 20 _____

SIGNATURE: _____

TITLE: _____

ORGANIZATION: _____

ADDRESS: _____

CHAPTER 803 DISCLOSURE STATEMENT FORM

In compliance with Chapter 60, Section 77B of the Massachusetts General Laws as amended by Chapter 803 of the Acts of 1985, I hereby certify that I have never been convicted of a crime involving the willful and malicious setting of a fire or of a crime involving the fraudulent filing of a claim for fire insurance; nor am I delinquent in the payment of real estate taxes in the City of Boston, or being delinquent, an application for the abatement of such tax is pending or a pending petition before the appellate tax board has been filed in good faith.

This statement is made under the pains and penalties of perjury this _____ day
of _____,
Month Year

Proposer Signature

Co-Proposer Signature (If Applicable)

Appendix 9 – Disclosure Beneficial Interest Statement

**DISCLOSURE STATEMENT FORM FOR
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

The undersigned party to a real property transaction with a public agency hereby discloses and certifies, under pains and penalties of perjury, the following information as required by law:

- (1) REAL PROPERTY:
- (2) TYPE OF TRANSACTION, AGREEMENT, or DOCUMENT:
- (3) PUBLIC AGENCY PARTICIPATING in TRANSACTION:
- (4) DISCLOSING PARTY'S NAME AND TYPE OF ENTITY (IF NOT AN INDIVIDUAL):
- (5) ROLE OF DISCLOSING PARTY (Check appropriate role):

<input checked="" type="checkbox"/> Lessor/Landlord	<input type="checkbox"/> Lessee/Tenant
<input type="checkbox"/> Seller/Grantor	<input type="checkbox"/> Buyer/Grantee

Other (Please describe):

- (6) The names and addresses of all persons and individuals who have or will have a direct or indirect beneficial interest in the real property excluding only 1) a stockholder of a corporation the stock of which is listed for sale to the general public with the securities and exchange commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation or 2) an owner of a time share that has an interest in a leasehold condominium meeting all of the conditions specified in M.G.L. c. 7C, s. 38, are hereby disclosed as follows (attach additional pages if necessary):

NAME

RESIDENCE

- (7) None of the above-named persons is an employee of the Division of Capital Asset Management and Maintenance or an official elected to public office in the Commonwealth of Massachusetts, except as listed below (insert "none" if none):
- (8) The individual signing this statement on behalf of the above-named party acknowledges that he/she has read the following provisions of Chapter 7C, Section 38 (formerly Chapter 7, Section 40J) of the General Laws of Massachusetts:

No agreement to rent or to sell real property to or to rent or: purchase real property from a public agency, and no renewal or extension of such agreement, shall be valid and no payment shall be made to the lessor or seller of such property unless a statement, signed, under the penalties of perjury, has been

Appendix 9 – Disclosure Beneficial Interest Statement

**DISCLOSURE STATEMENT FORM FOR
TRANSACTION WITH A PUBLIC AGENCY CONCERNING REAL PROPERTY
M.G.L. c. 7C, s. 38 (formerly M.G.L. c. 7, s. 40J)**

filed by the lessor, lessee, seller or purchaser, and in the case of a corporation by a duly authorized officer thereof giving the true names and addresses of all persons who have or will have a direct or indirect beneficial interest in said property with the commissioner of capital asset management and maintenance. The provisions of this section shall not apply to any stockholder of a corporation the stock of which is listed for sale to the general public with the Securities and Exchange Commission, if such stockholder holds less than ten per cent of the outstanding stock entitled to vote at the annual meeting of such corporation. In the case of an agreement to rent property from a public agency where the lessee's interest is held by the organization of unit owners of a leasehold condominium created under chapter one hundred and eighty-three A, and time-shares are created in the leasehold condominium under chapter one hundred and eighty-three B, the provisions of this section shall not apply to an owner of a time-share in the leasehold condominium who (i) acquires the time-share on or after a bona fide arms-length transfer of such time-share made after the rental agreement with the public agency is executed and (ii) who holds less than three percent of the votes entitled to vote at the annual meeting of such organization of unit owners. A disclosure statement shall also be made in writing, under penalty of perjury, during the term of a rental agreement in case of any change of interest in such property, as provided for above, within thirty days of such change.

Any official elected to public office in the commonwealth, or any employee of the division of capital asset management and maintenance disclosing beneficial interest in real property pursuant to this section, shall identify his position as part of the disclosure statement. The commissioner shall notify the state ethics commission of such names, and shall make copies of any and all disclosure statements received available to the state ethics commission upon request.

The commissioner shall keep a copy of each disclosure statement received available for public inspection during regular business hours.

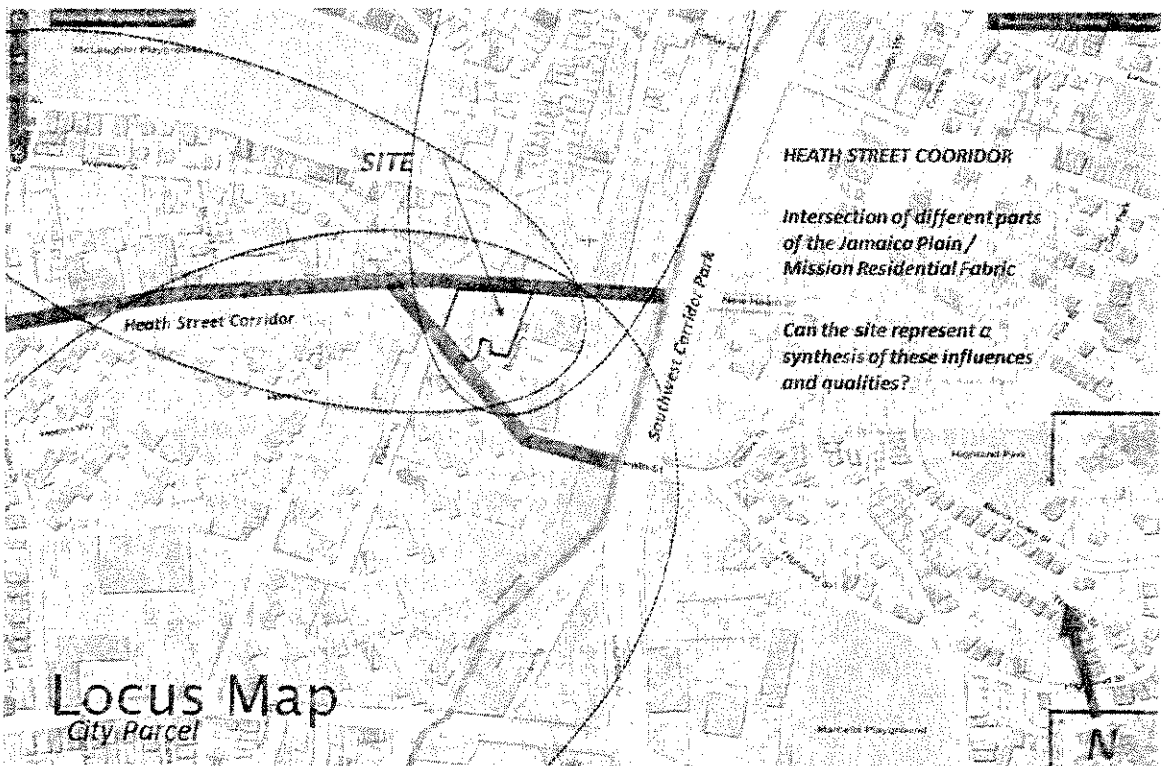
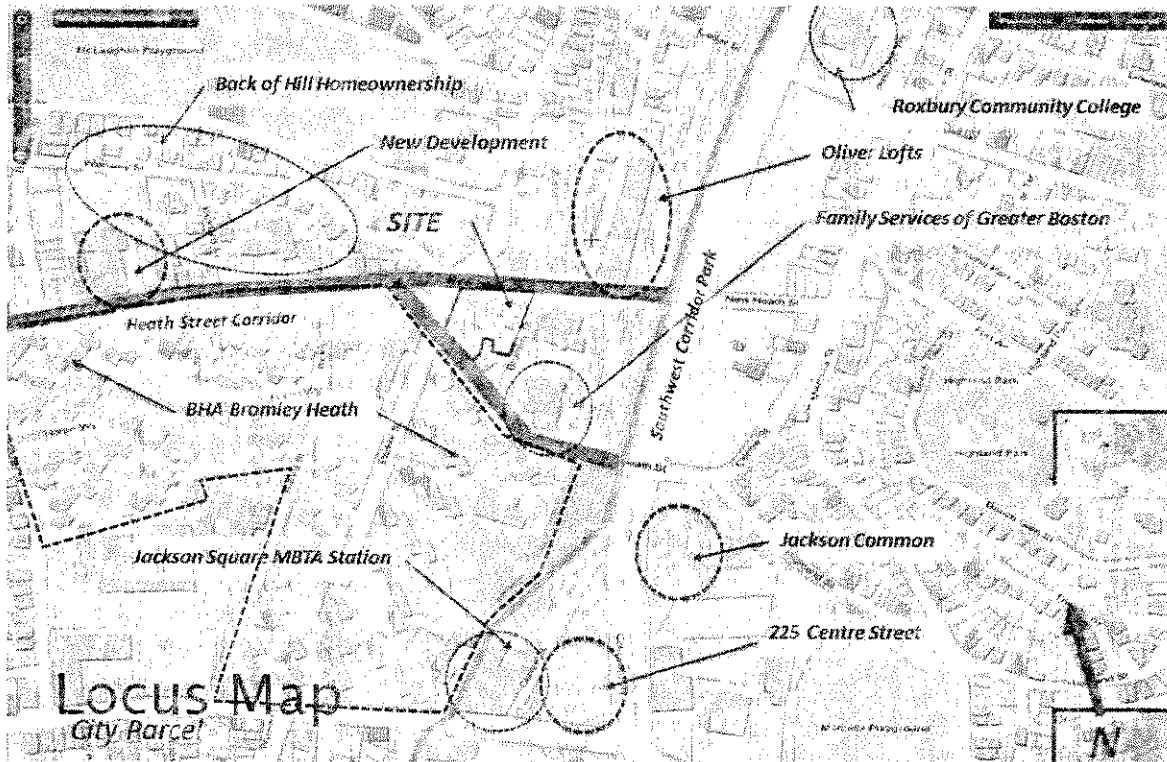
- (9) This Disclosure Statement is hereby signed under penalties of perjury.

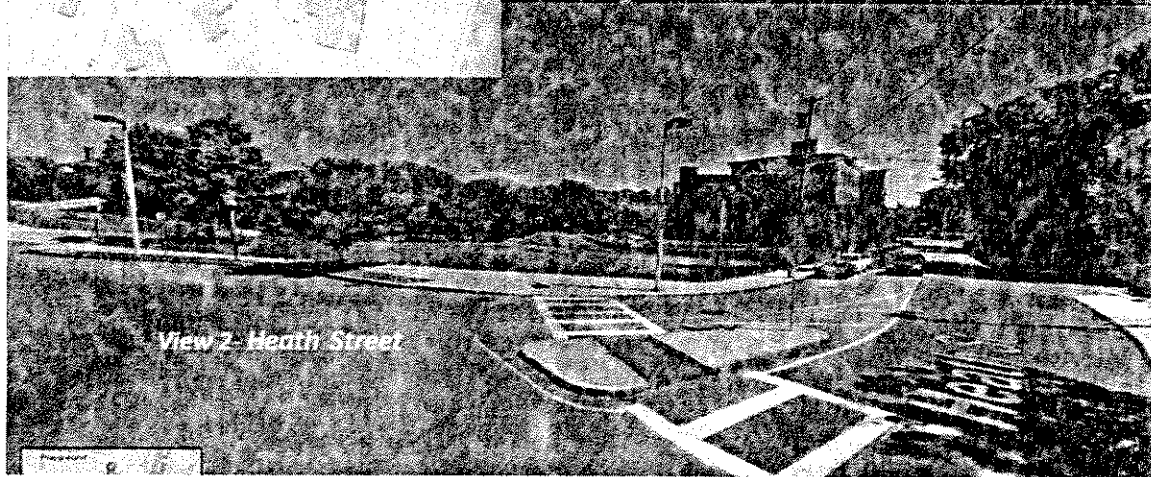
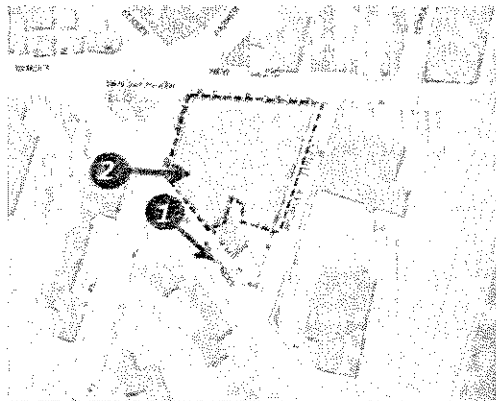
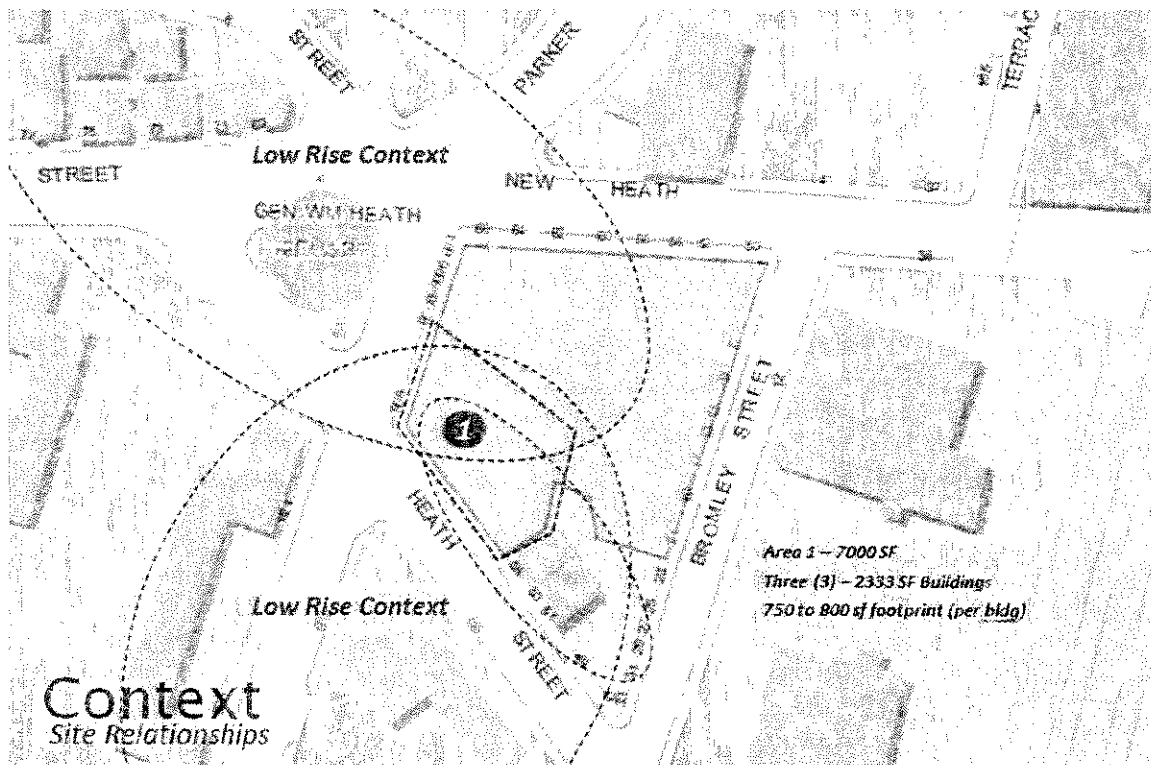
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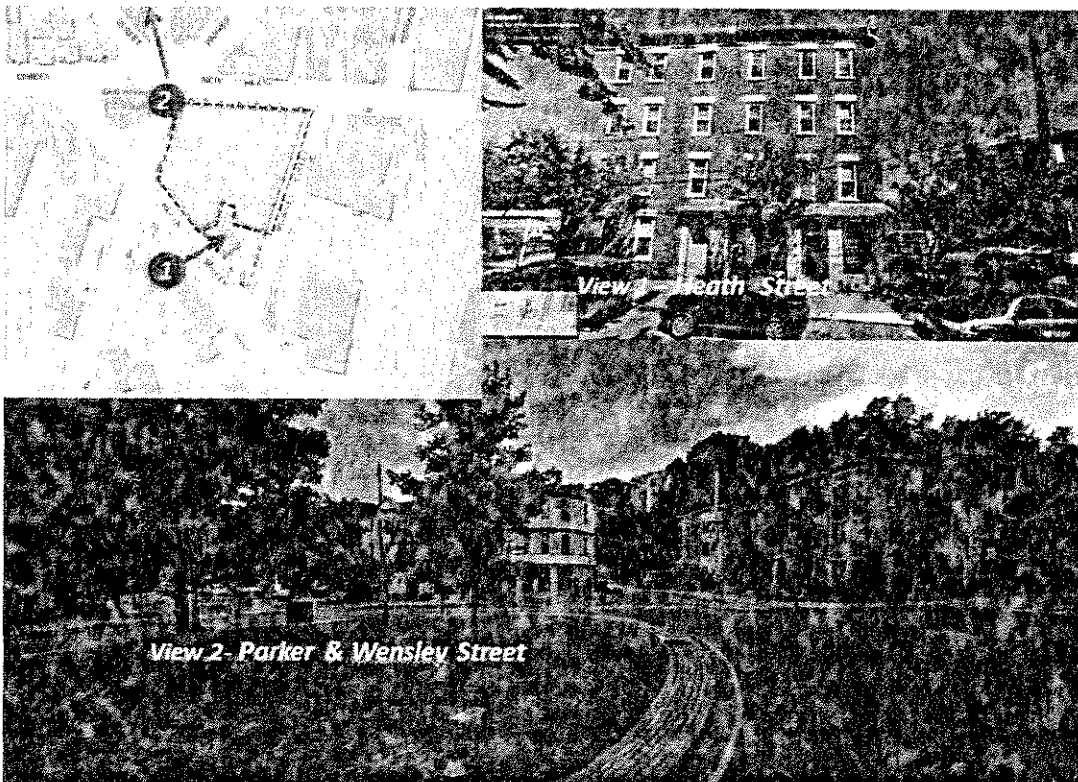
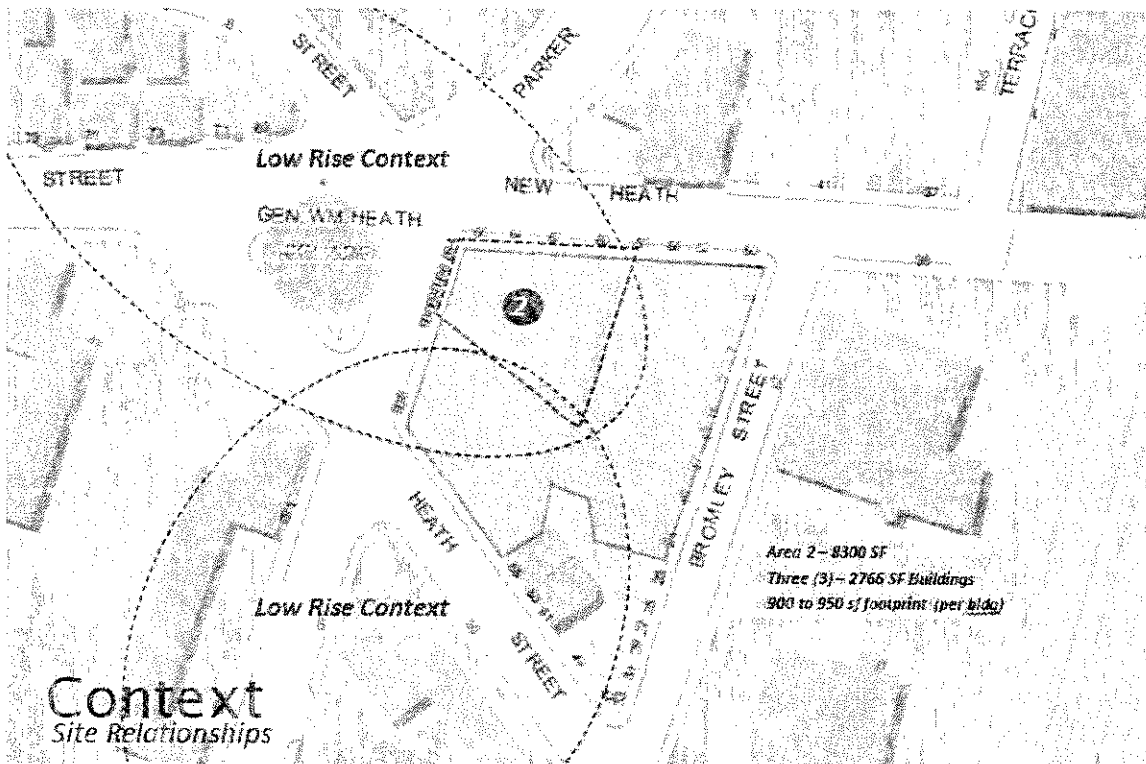
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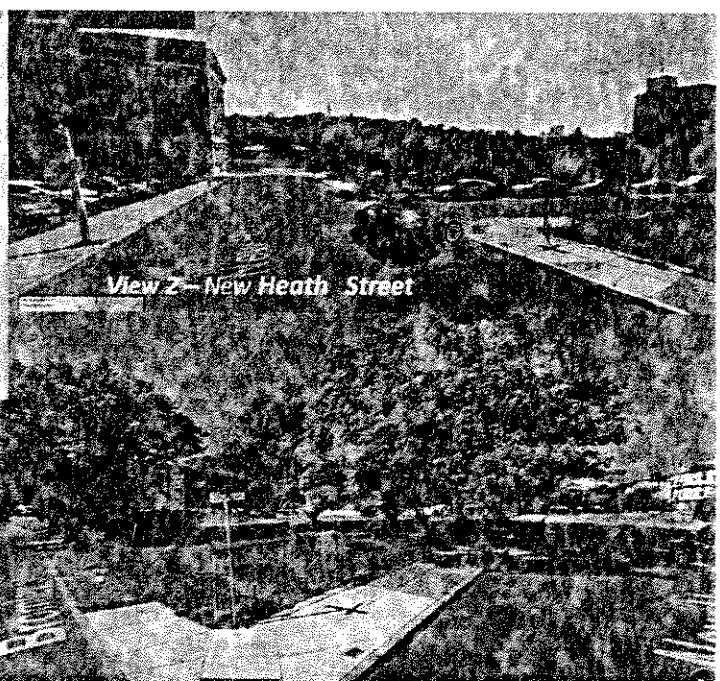
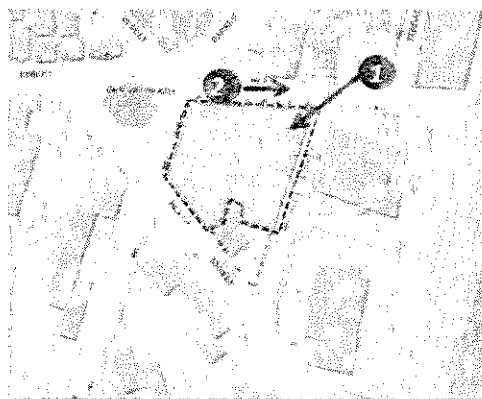
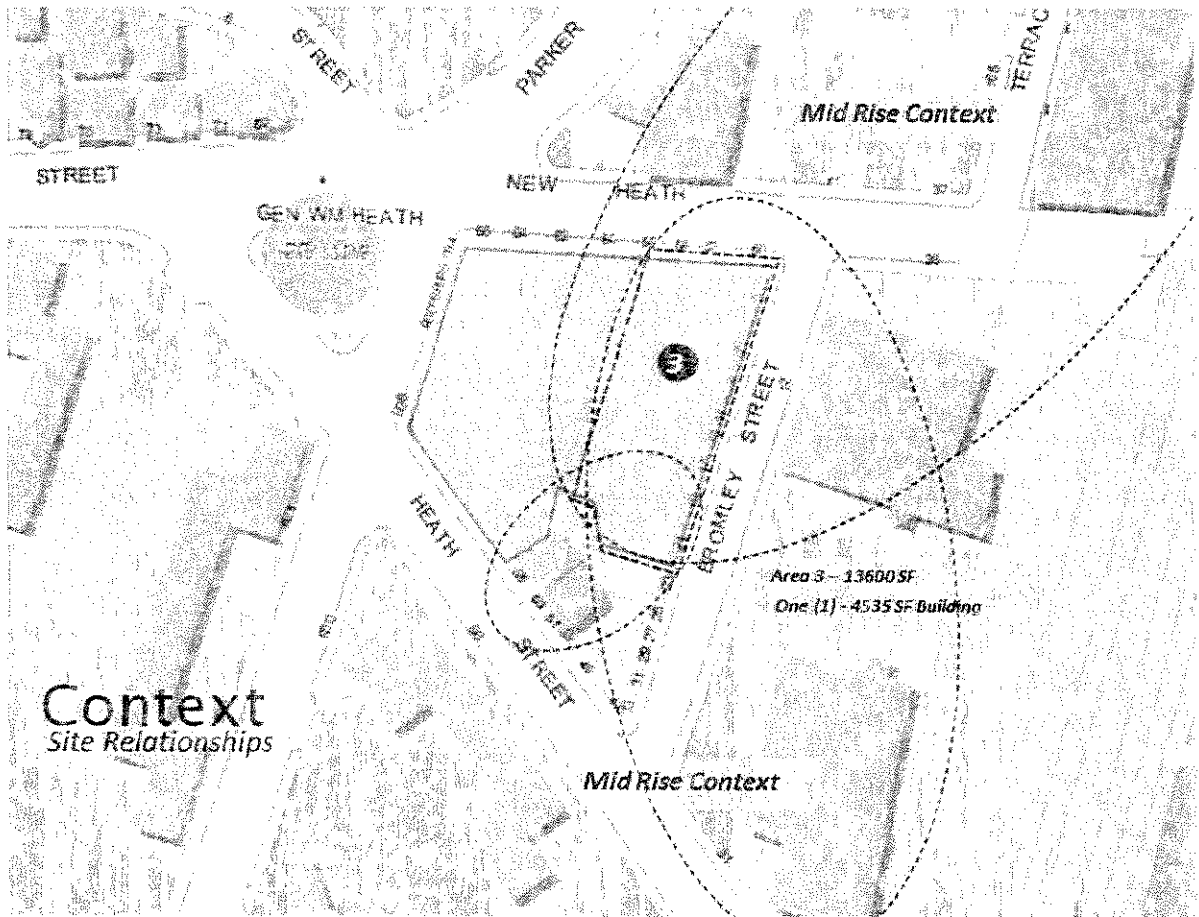
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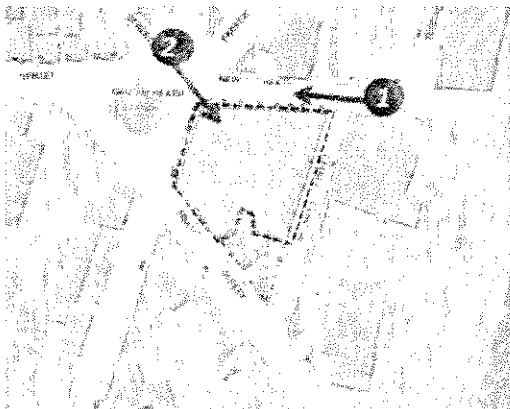
Appendix 10 – Existing Conditions, Context and Abutting Uses







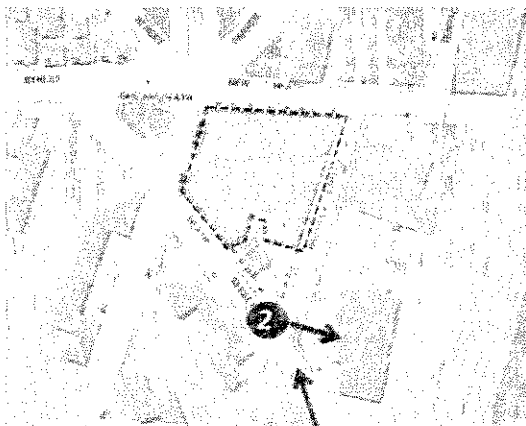




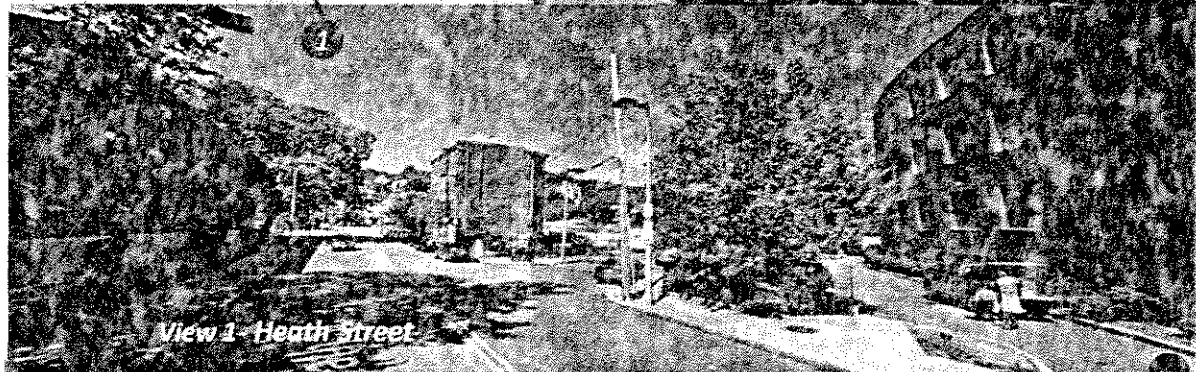
View 1 - New Heath Street



View 2 - Parker & New Heath Street



View 2 - Heath Street



View 1 - Heath Street

Appendix 11 – Design Submission Requirements

Design Submission Requirements

At Application, the Design Submission is to consist of the following:

- 2 full size bound schematic design sets (24x36)
- 1 set of outline specifications
- 1 digital (CD) copy of the schematic design drawings and outline specifications

The design submission is to focus on the best description of the physical design of the proposed project. The set is to illustrate the site planning for the development. The building(s) proposed relationship to contextual features and existing buildings. Documentation should focus on illustrating the massing, how the building will meet the streetscape and provide an overall context in which to understand the scale of the building(s) and their exterior finish. The set is also to include the interior spatial layout of each floor, all building elevations. Typical unit layouts are necessary in quickly evaluating compliance with dimensional standards. Guidelines for the composition of the set are outlined below:

Cover Sheet,

- ☐ Preliminary Review of Building and Zoning Code (indicate required & proposed zoning.)
- ☐ Preliminary MAAB Review
- ☐ Preliminary description and evaluation of MEP FP and HVAC systems (indicate required and proposed) based on code.
- ☐ Proposed building(s) type, gross and net square footage
- ☐ Unit type (1bd, 2bd, etc.) distribution by floor, square footage - identify handicap & visual access units.
- ☐ Developer's Name, Architect's Name and Consultant Names

Site Plan,

- ☐ A preliminary description of site dimension, lot lines, existing streets, location of adjacent buildings, and relative site elevations.
- ☐ Identify any environmental constraints such as wetlands, steep grades, ledge, etc.

Graphic Description of Development Concept,

- ☐ Typical building plans & Elevations (1/8" = 1'-0" scale)
- ☐ Typical unit plans include SF, dimensions, Accessibility (1/4" = 1'-0" scale).
- ☐ Typical wall section (3/4" = 1'-0" scale). Include R-values
- ☐ Exterior and interior photographs of building for renovations

Streetscape/Massing,

- ☐ Perspectival views of the proposed building(s) and its relationship to abutting buildings and existing grade.
- ☐ 3D models and renderings which convey the exterior finish and character of the building on the site

Outline Specifications,

- ☐ Outline specifications for the proposed project prepared by the project architect. The specifications should clearly indicate who completed them and on what date.

Design Standards,

DND Residential Design Standards and Review process can be located on the DND website at:
http://www.cityofboston.gov/dnd/D_O_Housing_Policies_TOC.asp

Appendix 12 – Affordability Income and Monthly Rent Limits

HUD Income Limits - Calendar 2014

Household Size	(1) 33% of median income	(1) 50% of median income	(1) 60% of median income	(2) CDBG Moderate Income: 80% of median income	(4) 80% of median income	(4) 95% of median income	(4) 100% of median income	(4) 110% of median income	(4) 120% of median income	(3) Inclusionary 80% Ownership limits	(3) Inclusionary 100% Ownership limits	(2) Inclusionary Rental limits
1 person	19,800	32,950	39,660	47,450	52,700	62,600	65,850	72,450	79,050	52,700	65,850	46,100
2 persons	22,600	37,650	45,360	54,200	60,200	71,500	75,300	82,800	90,350	60,200	75,300	52,700
3 persons	25,450	42,350	51,000	61,000	67,750	80,450	84,700	93,150	101,650	67,750	84,700	59,300
4 persons	28,250	47,050	56,640	67,750	75,300	89,400	94,100	103,500	112,900	75,300	94,100	65,850
5 persons	30,550	50,850	61,200	73,200	81,300	96,550	101,650	111,800	121,950	81,300	101,650	71,150
6 persons	32,800	54,600	65,760	78,600	87,300	103,700	109,150	120,050	131,000	87,300	109,150	76,400
7 persons	35,100	58,350	70,260	84,050	93,350	110,850	116,700	128,350	140,000			
8 persons	37,300	62,150	74,820	89,450	99,150	118,000	124,200	136,650	149,050			

(1) Issued by HUD effective May 1, 2014, and calculated in accordance with the IRS guidelines for consistency with HOME & LIHTC Programs.

(2) Income limits provided by HUD - May 1, 2014.

(3) Incomes set by the BRA for 2014.

(4) Incomes calculated based on the HUD published median income for a family of four in the Boston area, adjusted for family size and rounded to nearest 50

Monthly Rent Limits

Bedroom Size	Homeless Set-Aside (30% of median)	(1) Low HOME (50% of median)	(1) High HOME (65% of median)	LIHTC (50% of median)	LIHTC (60% of median)	(2) CDBG (50% of median)	(2) CDBG (80% of median)	(3) Section 8 FMR	Section 8 110% of FMR	(5) Inclusionary Rent Limits	(6) Maximum Rent 120% NSP Limits
SRO	371	642	782			618	890	776	853		1,482
0 BR/EF	495	856	1,042	824	991	824	1,186	1,035	1,139	1,020	1,976
1-BR	530	917	1,164	883	1,063	824 - 941	1,186 - 1,355	1,156	1,272	1,190	2,118
2-BR	636	1,101	1,408	1,058	1,275	941 - 1,176	1,355 - 1,694	1,444	1,588	1,361	2,541
3-BR	735	1,271	1,619	1,224	1,473	1,059 - 1,365	1,525 - 1,965	1,798	1,978	1,571	2,936
4-BR	820	1,418	1,786	1,365	1,644	1,271 - 1,554	1,694 - 2,236	1,955	2,151	1,701	3,275
5-BR	905	1,565	1,952	1,506	1,814	1,365 - 1,554	2,101 - 2,236	2,060	2,270		3,613
6-BR	933	1,711	2,118			1,365+	2,184+	2,339	2,573		4,106

(1) As issued by HUD January 22 2014, effective May 1, 2014

(2) As issued by City of Boston affordable rent statement

(3) As issued by HUD 8/3/12 effective 10/1/12

(5) as set by BRA dated 2014

(6) Maximum NSP Rents at 120% AMI

Utility Allowance - BHA Leased Housing Division, Effective 6/1/13

		SRO/0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6+ BR
Gas	Single Family	32/42	57	68	86	97	113	130
Heat	Duplex, 3 Decker	29/79	50	66	82	96	109	125
	Garden, Row/Townhouse	24/72	43	58	72	87	101	116
	Elevator/Highrise	25/33	37	44	54	61	76	88
Oil	Single Family	107/142	193	231	291	329	382	440
Heat	Duplex, 3 Decker	98/130	168	222	276	324	368	423
	Garden, Row/Townhouse	81/108	144	195	243	294	342	393
	Elevator/Highrise							
Electric	Single Family	36/48	66	79	99	112	130	150
Heat	Duplex, 3 Decker	33/44	57	76	94	110	125	144
	Garden, Row/Townhouse	28/37	49	66	83	100	116	134
	Elevator/Highrise	25/33	43	50	62	77	89	103
Water	Gas	5/7	10	13	16	20	21	24
Heat	Oil	17/23	30	40	49	61	66	75
	Electric	8/11	15	20	24	30	32	37
Water Use	Tenant Paid	17/49	71	92	120	136	158	179
Cooking	Gas Oven	5/6	8	10	13	16	17	20
	Electric Oven	5/7	9	12	14	18	19	22
Lights & Appliances		19/25	31	42	52	65	70	80
Refrigerator		2/3	3	3	5	5	7	7
Range		3/4	4	5	5	5	5	5

Inclusionary Development Price Limits 2014

		0 BR	1 BR	2 BR	3 BR	4 BR
BRA	80% AMI	\$134,300	\$162,500	\$190,500	\$218,700	\$248,900
	100% AMI	\$176,500	\$211,600	\$246,900	\$282,000	\$317,200

HOME Purchase Price/Value Limits (as of 3/25/13)

Suffolk	1 Living Unit	2 Living Unit	3 Living Unit	4 Living Unit	Last Updated
Existing	265,000	365,000	442,000	547,000	8/28/2013
New	311,000	398,000	482,000	589,000	

Home Per Unit Subsidy Caps:

Based on High Cost % effective 1/1/11

	0 BR & SRO's	1 BR Units	2 BR Units	3 BR Units	4+ BR Units
Boston	\$132,813	\$152,251	\$185,136	\$239,505	\$262,903

Revised 5/6/2014